

**MISDEMEANOR
PROBATION OFFICER**

TRAINING MANUAL



PEACE OFFICERS STANDARDS AND TRAINING

TRAINING MANUAL FOR MISDEMEANOR PROBATION OFFICERS

Table of Contents

	<u>Page</u>
1. What is Misdemeanor Probation Officer Training	5
2. Purpose of Misdemeanor Probation Officer Training	5
3. Important factors of the Field Training Program	5
4. Responsibility of Supervisor/Administrator/Designee	6
5. Responsibility of Agency Training Officer	6
6. Description of Field Training Forms and Their Use	7
7. Disposition of Completed Forms	8
8. Facility Training Guide	9

FORMS

A. POST IV-2 (Misdemeanor Probation Officer) Facility Training Record Form (Send only this form back to POST)	4
B. Maintain the following forms on file at your local agency:	
POST IV-1 (Misdemeanor Probation Officer) Training Officer Instruction Guide	10
POST IV-3 (Misdemeanor Probation Officer) Sample of Training Officer Weekly Report Form	15
POST IV-4 (Misdemeanor Probation Officer) Sample of Training Officer Evaluation Report	16

This manual is the property of the Peace Officer Standards and Training Council. It has been issued to:

< NAME OF AGENCY >

For the purpose of training

POST ID #

Officer's Name

____-____-____-____
Last 4 of SSN

____-____-____-____
1st Four Letters of
First Name

____-____-____
DAY of Birth

Upon completion of the Agency Training Program, return this completed POST form to the POST Council. Included in this manual are actual forms, POST IV-1 (Misdemeanor Probation Officer) and POST IV-2 (Misdemeanor Probation Officer), as well as sample forms POST IV-3 (Misdemeanor Probation Officer) and POST IV-4 (Misdemeanor Probation Officer).

Additional forms, POST IV –3, and IV-4 will be furnished to each agency to be used and retained by the agency.

DATE PROBATION OFFICER HIRED: _____

DATE OF POST TRAINING: _____
Date Place Class No.

AGENCY TRAINING COMPLETED: _____
Date Location

NOTE: The POST IV-2 (Misdemeanor Probation Officer) form must be forwarded to the Peace Officer Standards and Training, 700 S. Stratford Dr., Meridian ID. 83642-6202, upon completion to receive 40 hours training credit toward certification.

POST IV-2 (Misdemeanor Probation Officer)
(Return this page only to POST)

1. Name of Probation Officer - 4. POST ID # <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="text-align: center;"> ____-____-____ Last 4 of SSN </div> <div style="text-align: center;"> - ____-____-____ 1st Four Letters of First Name </div> <div style="text-align: center;"> - ____-____ DAY of Birth </div> </div>	2. POST Class Date: 5. Agency Name:	3. Agency Training Dates
--	--	--------------------------

Name of Training Officers:

 1. _____
 2. _____
 3. _____

This training guide is a listing of the basic misdemeanor probation officer responsibilities, tasks, and procedures. The assigned training officer (F.T.O.) will use this guide during the orientation and training of the probation officer who has successfully completed the basic P.O.S.T. Academy for Probation Officers. The trainer will explain each item, and whenever practical demonstrate the task or procedure. If the trainer is not available to demonstrate the task, an approved substitute may be provided. When the trainer believes the probation officer in training is capable of handling a specific task, s/he will require the probation officer to perform the task while s/he observes. Sufficient time should be allowed for explaining and/or performing each task. When a task has been satisfactorily performed, the trainer will enter the date of the completion in the proper column and initial. This list is not exclusive, and when a task arises that is not on the list, the trainer should demonstrate proper procedure for that task, and then record the task at the end of the guide. *** IF A LISTED TASK OR PROCEDURE DOES NOT APPLY TO YOUR AGENCY, PLACE N/A IN THE ALLOTTED SPACE. IF SOME TASKS OR PROCEDURES LISTED CANNOT BE DEMONSTRATED WITHIN YOUR AGENCY, YOU MAY INQUIRE ABOUT TRAINING FROM A NEIGHBORING AGENCY FOR EXPLANATION AND DEMONSTRATION.**

6. I have been instructed in all items recorded in this agency training guide.

 Signature of Trainee: _____

 Date: _____

7. Reviewed by:

 Signature of Training Reviewer: _____

 Date: _____

8. I attest that the above named Trainee has satisfactorily completed the Agency Training Program.

 Signature of Supervisor/Administrator: _____

 Date: _____

Agency Training Procedures for Misdemeanor Probation Officers

1. What is the Agency Training?

Agency training is a process by which an individual probation officer receives formal instruction on the job for special and defined purposes specific to his/her agency. Assigned trainers and Facility Training Officers (F.T.O.'s) will provide the officer with practical application training for the duration of the program. As often as practical, the officer will be required to perform the tasks and show an acceptable level of competency.

Agency training is designed to cover a minimum of 40 hours of supervised training. It is recommended, however, to utilize as much time as needed to be assured of adequately covering all material sufficiently. Upon satisfactory completion of the program and submission of this manual properly completed, forty (40) hours certified training credit will be granted to the officer.

2. Purpose of Agency Training

The recognition of specialized misdemeanor probation officer training is of importance to the officer and the administration s/he works for. Formal classroom training and limited demonstration cannot teach the officer all that s/he needs to know. On-the-job training specific to his/her agency is the purpose of this program.

The Agency Training Program is intended to give the probation officer instruction, direct supervision, guidance and experience so that the officer may develop good judgment, efficiency, and good habits of conduct and appearance. Agency Training will serve as an evaluation of both the probation officer and the classroom training curriculum to the P.O.S.T. Academy. The agency Training period also serves to aid in determining if the probation officer meets all requirements to become a certified officer.

3. Important Factors in the Misdemeanor Probation Officer Training Program

The probation officer may have completed the Basic Misdemeanor Probation Officer Academy prior to the officer's assignment to an agency training program. The classroom instruction areas are assessments (including the LSI-R), case plans, communication, core programs, courtroom protocol, diversity, domestic violence, drug testing, ethics, evidence based practices, gangs, health and fitness, criminal justice, legal and liability, managing offenders with mental illness, managing sex offenders, motivational interviewing, officer safety, reports, misdemeanor probation standards, supervision strategies, and defensive tactics.. All these areas have been identified as the most important training areas that should not be postponed. This gives the probation officer basic knowledge and skills needed to operate in the agency with a training officer. For a probation officer to obtain the utmost benefit from the classroom instruction, two weeks of orientation in the officers own department is recommended so that the officer can better apply his classroom training and learn policy, procedures, and practices specific to his/her agency.

To allow for a successful Agency Training Program, it is necessary that the field training be conducted in a manner designed to develop a technically skilled and professional officer. Therefore, the Agency Training Program requires the following:

- A. Agency Training Officers must be carefully chosen from the most skilled and effective officers in the probation department.

- B. Training Officers must possess the ability to communicate their knowledge and skills to the trainee.
- C. Training Officers must reflect the higher levels of personal integrity, character, and maturity. The use of unmotivated officers must be avoided.
- D. Initial training must be provided to all training officers, outlining the duties and responsibilities of their position.
- E. In-service training from Agency Trainers must be provided to cover the latest techniques, departmental policies, procedures and practices, and changes in the law pertaining to the supervision of misdemeanors in the system.

4. Responsibility of the Supervisor/Administrator or Agency Designee**

When a probation officer is assigned to a unit for training, the Supervisor/Administrator will be responsible for the following:

- A. Introduction of the probation officer to as many personnel as possible.
- B. Familiarization of the officer with the basic operations of the agency.
- C. Assignment of a Training Officer to begin his/her orientation of agency operations. The officer should be assigned to one trainer at a time. It is beneficial to allow for more than one trainer to complete the necessary training.
- D. The Supervisor/Administrator or Designee should meet weekly with training officer to discuss the progress of the probation officer trainee.
- E. The Supervisor/Administrator or Designee should personally consult with the trainee and trainer when the trainer believes the trainee will not develop into a successful misdemeanor probation officer. If the supervisor, after consultation, is of the opinion that the trainee is not likely to become a successful misdemeanor probation officer, the supervisor should consult with his/her agency director and/or Human Resource Department and legal representative to determine a proper course of action.

**** A Supervisor/Administrator can appoint a designee on their behalf, such as a Senior Probation Officer or representative of the Court, or anyone who has the responsibility of supervising the officer in training.**

5. Agency Training Officer Responsibility

The Training Officer should have complete responsibility of the trainee during the agency training assignment. The trainee should always work with the assigned Trainer and should have the same days off and work schedules whenever this is practical.

The Trainer will ensure that the trainee is familiar with the complete operation of the agency, and all operations as applicable to your department.

Using the Field Training Guide, the Trainer shall:

- A. Explain overall operational procedures and existing policy of the agency, to include all departments of the agency.
- B. Conduct self in professional, exemplary manner.
- C. Maintain an effective student-teacher relationship.
- D. Complete an observation report for each day worked with the trainee.
- E. Advise Supervisor/Administrator or Designee of the trainee's progress and consult with supervisor/administrator if the trainer feels that the trainee will not develop into a successful misdemeanor probation officer.
- F. Review evaluations with trainee and obtain his/her signature on all completed forms
- G. Ensure that the trainee reports are completed and turned in.
- H. Allow the trainee to perform such tasks that the trainer feels the trainee is competent and ready to assume.
- I. Notify supervisor/administrator or designee as soon as practical, should a problem arise whereby he/she believes he/she cannot fairly train or evaluate the assigned trainee.
- J. Place initials and date in the proper column of the Instruction Guide when the trainee has explained and demonstrated the listed tasks. The trainer shall see that the trainee places his own initials in the proper column when the trainee satisfactorily performs or practices the listed task. When the trainee initials the performance practice column, the trainer should insert the date or see that the trainee does so.

During the field training period, the trainer will be observing and evaluating the trainee's performance. A meaningful evaluation is possible only if the trainer affords the trainee the fullest opportunity to learn. It should be the aim of every trainer to start the trainee on the way to becoming the best Misdemeanor Probation Officer in the department.

6. Description of Field Training Forms and Their Use

A. POST IV –1 (Misdemeanor Probation Officer) Field Training Officer Instruction Guide

To assist and formalize the field training program the "Field Training Guide" has been developed, which contains an extensive listing of duties and procedures. This by no means, is an exhaustive list nor is it intended to limit the field training officer's training subject material.

The trainer should allow sufficient time for explaining each listed procedure or situation. The trainer should explain and demonstrate (if appropriate) the situation or task before requiring the trainee to perform or practice the task, if performance is necessary to gain knowledge and skill. Some of the tasks may not require performance (some probation procedures cannot be performed unless specific circumstances occur, such as a probation violation hearing). In these cases, only an explanation and verbal understanding is required. When such a situation occurs, the trainer should write N/A in the spaces provided for demonstration and practice. If a listed task or procedure does not apply in your particular department, write N/A in all three spaces.

The Agency Training Officer Instruction Guide is to be brought up to date at the end of each day's training.

B. POST IV –2 (Misdemeanor Probation Officer) Agency Training record

This form will enable the department to quickly determine who the Field Training Officers were in the case of each trainee, what assignments were completed, the name of the supervisor/administrator accepting the record of completion, a record of the trainee signing and attesting that he or she has been instructed in all the items listed in the Field Training Instruction Guide, and finally, a record for the department head attesting that the trainee has satisfactorily completed the Agency Training Program.

It is recommended that a copy of this record be retained in the officer's personnel file within the officer's own department.

C. POST IV –3 (Misdemeanor Probation Officer) Agency Training Officer Weekly Report

To be executed by the agency trainer at the completion of each week. The trainer should be trained during the initial FTO training period what acceptable or norm average would be in the areas to be evaluated. The trainer's Weekly Progress Report should contain recommendations as to how the trainee can improve any unsatisfactory ratings, which should also be shared with the trainee. The Weekly Progress report shall be forwarded to the supervisor/administrator after completion.

D. POST IV-4 (Misdemeanor Probation Officer) Field Training Officer Evaluation Report

To be executed by each trainer who has been assigned to the trainee at the completion of the Agency Training Program. The comments should be specific in each of the areas to be evaluated. The written summary portion of the evaluation should contain an overview of the entire period of time covered by the report. It should cover the particular points used to justify the Agency Training Officer's recommendations to release the trainee to regular assignments or not, as the case may be. This documentation is to be forwarded to the supervisor/administrator upon completion.

7. Disposition of completed forms

Completed POST IV-1 (Misdemeanor Probation Officer) Agency Training Manual Instruction Guide, POST IV-3 (Misdemeanor Probation Officer) F.T.O. Weekly Progress Reports, and the POST IV-4 (Misdemeanor Probation Officer) F.T.O. Evaluation Report should be maintained in the trainee's personnel file within his/her own department.

THE POST IV-2 (MISDEMEANOR PROBATION OFFICER) AGENCY TRAINING RECORD MUST BE FORWARDED TO THE PEACE OFFICER STANDARDS & TRAINING ACADEMY UPON COMPLETION. This is necessary as successful completion of this program is one of the minimum training requirements to be met for Basic Misdemeanor Probation Officer Certification.

POST IV –1 (MISDEMEANOR PROBATION OFFICER)

FACILITY TRAINING GUIDE

(When completed, keep in your department's officer file and return POSTIV-2 (Misdemeanor Probation Officer) for 40 hours credit to training records.)

1. Trainee Orientation
 - a. Facility Tour
 - b. Organizational flow chart
 - c. Professional Conduct
2. Legal and Liability Issues
 - a. Criminal Rules/Idaho Code
 - b. Probation related legal issues
3. Court Procedures and Protocol
 - a. Court hearings
 - b. Court protocol
4. Written Skills
 - a. Writing emphasis
 - b. Background information
 - c. Case plans
 - d. Affidavits
 - e. Other writing requirements
5. Case Management
 - a. Case flow
 - b. Information management
 - c. Field supervision
 - d. Courtesy Supervision
 - e. Communication skills
 - f. Special needs
 - g. Other duties
 - h. Safety issues

POST MISDEMEANOR PROBATION OFFICER IV-1 AGENCY TRAINING OFFICER INSTRUCTION GUIDE

I. TRAINEE ORIENTATION

A. Facility Tour	Explained	Demonstrated	Practiced
1. Layout of Agency			
2. Procedure for arriving & leaving building			
3. Entrances and exits			
4. Administrative offices			
5. Courtroom(s)			
6. Jail			
7. Conference room, break-room, bathrooms			
8. Building security (if applicable)			
9. Parking (if applicable)			
B. Organizational Flow Chart	Explained	Demonstrated	Practiced
1. Chain of command			
2. Administrator/Director			
3. Agency Departments (if applicable)			
4. Judge(s)			
5. Prosecutors & Public Defenders			
C. Professional Conduct	Explained	Demonstrated	Practiced
1. Agency Policies and Procedures			
2. Misdemeanor Probation Standards and Professional Responsibilities			
3. Reporting for work on time			
4. Off-Duty actions and behavior			
5. Use of drugs or alcohol			
6. On-the-job conduct			
7. Sexual Harassment			
8. Insubordination			
9. Agency issued identification			
10. Sick and vacation leave			
11. Cultural diversity/Discrimination			
12. Abuse of position			
13. Bribes, gratuities, rewards, gifts			
14. Standard work hours/time cards			
15. Immoral conduct			
<div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="width: 45%;"> <div style="border-top: 1px solid black; margin-bottom: 10px;">Field Trainer Signature Date</div> <div style="border-top: 1px solid black;">Supervisor/Administrator Signature Date</div> </div> <div style="width: 45%;"> <div style="border-top: 1px solid black; margin-bottom: 10px;">Trainee Signature</div> </div> </div>			

II. LEGAL AND LIABILITY ISSUES

A. Criminal Rules and Idaho Codes	Explained	Demonstrated	Practiced
1. Handout of Criminal Codes specific to Idaho (if applicable)			
B. Probation- Related Legal Issues			
1. Probationer Rights			
2. Court Testimony			
3. Subpoena to Testify			
4. Reporting physical/sexual abuse of Probationer a. Prisoner Rape Elimination Act (PREA)			
5. Full Fourth Amendment Waiver			
6. Preserving Chain of Evidence			
7. Ethical behavior regarding personal and agency liability			
8. Other agency-specific legal issues			
<div style="display: flex; justify-content: space-between; margin-top: 20px;"> <div style="width: 45%;"> <p>_____ Field Trainer Signature Date</p> <p>_____ Supervisor/Administrator Signature Date</p> </div> <div style="width: 45%;"> <p>_____ Trainee Signature</p> </div> </div>			

III. COURT PROCEDURE AND PROTOCOL

A. Court Hearings	Explained	Demonstrated	Practiced
1. Sentencing			
2. Probation Violations			
3. Discretionary/Unscheduled Jail Time			
4. Suspended Jail Time			
5. Other (if applicable_)			
B. Court Protocol			
1. Role of Probation Officer in Court Hearings			
2. Preparing probationer for Court Hearings			
3. Preparing paperwork for Court Hearing			
4. Presentation of Information to the Court			
5. Procedure for approaching the Bench in Court Hearings			
6. Appropriate Court Attire and Demeanor in Court			
7. Agency specific Court protocol and procedure			
<div style="display: flex; justify-content: space-between; margin-top: 20px;"> <div style="width: 45%;"> <p>_____ Field Trainer Signature Date</p> <p>_____ Supervisor/Administrator Signature Date</p> </div> <div style="width: 45%;"> <p>_____ Trainee Signature</p> </div> </div>			

IV. WRITTEN SKILLS

A. Writing Emphasis	Explained	Demonstrated	Practiced
1. Computer Training			
2. Spelling, neatness, legibility			
3. Proper Sentence Structure			
4. Accuracy, thoroughness			
5. Agency specific writing expectations			
B. Background Information	Explained	Demonstrated	Practiced
1. Probationer Interview			
2. Educational Information			
3. Collateral Information (other professionals involved with probationer)			
4. Information from Police Report			
5. Victim Impact Information (if applicable)			
C. Case Plans	Explained	Demonstrated	Practiced
1. Proper Format			
2. Information Requirements			
3. Attachments			
F. Affidavits	Explained	Demonstrated	Practiced
1. Types of Affidavits (Probation Violation, Early Dismissal, etc.)			
2. Format Requirements			
3. Procedure for submitting Affidavit			
G. Other Writing Requirements	Explained	Demonstrated	Practiced
1. Appointment letters (if applicable)			
2. Letters to other agencies (request for Courtesy Supervision, etc.)			
3. Document probationer contact, collateral contact, behavior (field notes)			
<div style="display: flex; justify-content: space-between; margin-top: 20px;"> <div style="width: 45%;"> <p>_____ Field Trainer Signature Date</p> <p>_____ Supervisor/Administrator Signature Date</p> </div> <div style="width: 45%;"> <p>_____ Trainee Signature</p> </div> </div>			

V. CASE MANAGEMENT

A. Case Flow	Explained	Demonstrated	Practiced
1. New Case to the Agency			
2. Case Placement (Diversion/Probation) if applicable			
3. Intake/Court Investigation (agency specific)			
4. Supervision level based on risk assessment			
a. Specialized caseloads (problem solving courts, DUI, sex offenders, mental health)			

B. Field Supervision	Explained	Demonstrated	Practiced
1. Initial Field Meeting			
a. Advising probationer of terms of probation			
b. Answering any questions regarding previous Court Hearing (Sentencing)			
2. Upholding the Court Orders			
3. Field Visits			
a. Home visits (assessing the safety of the home environment)			
b. School visits			
c. Community/Employment visits (if applicable)			
d. Office visits			
4. Risk re-assessments			
5. Field notes			
6. Monitoring collection of fees and restitution (if applicable)			
7. Obtaining urine samples (if applicable)			
8. Referring probationer and family to community based resources			
9. Collaboration with Jail upon probationer incarceration.			
a. Case planning for release			
C. Courtesy Supervision	Explained	Demonstrated	Practiced
1. Policy and Procedure for Courtesy Supervision			
2. Paperwork for Courtesy Supervision			
3. Communicating with Accepting/sending County			
D. Communication Skills	Explained	Demonstrated	Practiced
1. Confronting/communicating with hostile probationers			
2. De-escalating volatile situations			
3. Role model appropriate behavior (verbal and non-verbal)			
4. Communicating with other community agencies			
5. Engage in community activities			
F. Special Needs	Explained	Demonstrated	Practiced
1. Specialized caseloads (problem solving courts, DUI, sex offenders, mental health)			
2. Identifying symptoms of mental health disorders			
3. Identifying illegal drugs and paraphernalia			
4. Recognizing symptoms of substance abuse			
5. Understanding cultural differences (personal, community)			
G. Other Duties	Explained	Demonstrated	Practiced
1. Electronic Monitoring (installing if applicable)			
2. Searching probationers (if applicable)			
3. Searching probationers' vehicles (if applicable)			
4. Searching homes (if applicable)			
5. Confiscating contraband (if applicable)			
6. Transporting Probationers			
7. Other tasks that are agency specific			

H. Safety	Explained	Demonstrated	Practiced
1. Office Safety			
2. Field visit safety			
3. Agency specific safety and self-defense policy and procedure			
<div style="display: flex; justify-content: space-between; margin-top: 100px;"> <div style="width: 45%;"> <p>_____ Field Trainer Signature Date</p> <p>_____ Supervisor/Administrator Signature Date</p> </div> <div style="width: 45%;"> <p>_____ Trainee Signature</p> </div> </div>			

POST IV-3 (Misdemeanor Probation Officer)
(Sample form retained by Agency)

AGENCY TRAINING OFFICER WEEKLY PROGRESS REPORT

1. Name of Trainee	2. Trainee Class Number	3. Report Date			
4. Agency assignment	5. Week #				
	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	
	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>	
5. Factor	POOR	FAIR	AVG.	GOOD	SUPERIOR
6. Appearance a. Dress and attire b. Posture and carriage c. Personal cleanliness					
7. Cooperation and loyalty a. Works toward a common goal b. Willing to accept responsibility c. Supports superiors d. Good team worker					
8. Interest and Attitude a. Seeks help with problems b. Willing to learn c. Attitude toward constructive criticism d. Shows pride in work e. Contributes to good morale f. Confidence in oneself					
9. Public Contact a. Professional attitude toward the public b. Ability to communicate effectively c. Tact and discretion d. Self control					
10. Judgment a. Common sense b. Use of good judgment under pressure c. Ethical d. Non judgmental					
11. Probationers a. Fair, consistent, no favoritism b. Takes control in crisis situation c. Uses verbal and non-verbal skills d. Uses officer safety skills					
12. COMMENTS 					
13. Field Training Officer Signature	14. Agency Supervisor			15. Date	

POST IV-4 Misdemeanor Probation Officer
(Sample form retained by Agency)

AGENCY TRAINING OFFICER EVALUATION REPORT

1. Name of Trainee	2. Trainee Class #	3. Report date
---------------------------	---------------------------	-----------------------

4. Agency Assignment	5. Agency Assignment Dates From _____ To _____ From _____ To _____
-----------------------------	---

FACTOR	COMMENTS
6. Officer Safety Skills Does the trainee practice recommended procedures in case management of probationers? Does the trainee foresee any situations that could be volatile or dangerous? Does the trainee understand the procedures for safety in office, homes, or in the community?	
7. Community Contacts What is the trainee's attitude with the community? Does the trainee show proper concern for the community? Does the trainee show appropriate tact and diplomacy while addressing the community?	
8. Ethics and Departmental Values How is the trainee's attitude toward other employees? Does the trainee recognize the rights and dignity of all persons? Does the trainee act in a manner that is respectable to him/herself and the department/agency?	
9. Crisis Is the trainee able and prepared to handle a crisis situation such as threat of suicide? Can the trainee demonstrate proper procedures and respond with calmness and composure?	

Agency Training Officer Signature	Trainee's Signature	Date
--	----------------------------	-------------